

30th June, 1943.

6A)
B.S. 1943/6B)
6C)

NEW SOUTH WALES.

BUSINESS STATISTICS AND DIGEST FOR JUNE, 1943.

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GENERAL:

Seasonal Conditions generally are satisfactory. The pastoral outlook is the best for several winters. Western and south-western areas require rain.

The index of rainfall in coastal areas in May, 1943 reached the high level of 116% above normal. Rainfall was also above normal in wheat (18%) and sheep districts (24%).

Rainfall in June was generally light.

NEW SOUTH WALES - RAINFALL INDEX.

Weighted average ratio of actual to normal rainfall.

Normal rainfall each month = 100.

Period.	Sheep Districts.	Wheat Districts.	Dairying (Coastal) Districts
Year - 1942	111	110	97
1942 - Oct.	127	97	332
- Nov.	165	164	153
- Dec.	129	93	140
1943 - Jan.	141	138	75
Feb.	52	55	60
Mar.	15	17	44
Apr.	133	148	48
May	124	118	216

Miscellaneous. To meet demands for labour for harvesting in N.S.W., a register is being compiled of single rural workers aged up to 45 years. These men will be developed into a mobile force. In addition there will be available in Australia a pool of 5,000 soldiers aged 18-19. Estimates of labour requirements are being prepared in conjunction with District War Agricultural Committees.

High priority has been given to the manufacture of many kinds of agricultural machinery. Estimates of minimum requirements are being prepared by District W.A. Committees.

The Director-General of Agriculture promised staffs and finance for the Committees. He is also investigating the supply of accommodation for casual workers.

The Minister for Commerce and Agriculture stated that the Government's objective was to increase vegetable production to the point of minor gluts. It is hoped to bring new areas under crop by arranging further contracts for the supply of vegetables to the Services. In N.S.W. at present only half the Services' requirements are supplied under contract. Hawkesbury River valley farmers have been asked to grow 3,000 tons of sweet corn and 5,000 tons of tomatoes this year.

Food control regulations gazetted 28th June, 1943 give wide powers to the Controller-General of Foods. Production, processing and distribution are within his control.

The Minister for Commerce has asked the Prices Commissioner to peg the prices of fodder used by metropolitan dairymen.

A central co-ordinating authority for the Australian fishing industry has been set up within the Department of War Organization of Industry. Wholesale prices of fish in Sydney have been raised after investigation of returns in the industry.

Sugar manufactured in Australia in the 1942 season was estimated by the Colonial Sugar Refining Co. at 627,000 tons. Production in 1941 was 721,000 tons and 570,000 tons is forecast for the 1943 season. Sugar sales in Australia and New Zealand reached a record level of 500,000 tons in the year ended March, 1943. Due to rationing sales were 38,000 tons lower in the second half of the year than in the corresponding period of 1941/42.

The text of the draft agreement for a United Nations' Relief and Rehabilitation Administration to deal with post-war distress was issued by the Prime Minister. The policy-making body of the Administration is to be the Council which will meet twice yearly and will consist of one representative of each nation. The Central Committee of the Council, consisting of representatives of Britain, Russia, China and U.S.A. will exercise the powers and functions of the Council between sessions. Each member Government is pledged (Article V) to give its full support within the limits of its available resources, and subject to the requirements of its constitutional procedure, through contributions of funds, material, equipment and services for use in its own, adjacent or other areas in need in order to accomplish the purposes of Article 1. These purposes are (in part) to plan, co-ordinate or arrange for measures for the relief of victims of war in any area under the control of the United Nations through the provision of food, fuel, clothing and other basic necessities, housing facilities, medical and other services and to facilitate transportation and production in relief areas. It is also provided that member Governments are to formulate measures for joint or individual action for the co-ordination of purchasing and the use of ships after the cessation of hostilities with a view to integrating the plans and activities of the Relief Administration with the total movement of supplies and for the purpose of achieving an equitable distribution of available supplies.

WOOL.

The pastoral outlook is the best for several winters although some western and South-western districts are dry. Stock values are firm due to the strong demand for sheep for breeding, lamb raising and wool growing.

The Government has asked for the marketing of greater numbers of sheep than usual in the winter period. It is desired to spread supplies more evenly and ease the burden of providing transport and slaughtering in the peak spring and summer period. A Livestock Production Committee, representative of all interests in the industry, has been appointed to assist the Meat Controller. The wholesale price for fat lamb carcasses (to 36 lb.) has been increased from 8d. to $8\frac{1}{2}$ d. per lb.

The wool appraisal year has ended. Throughout Australian retention money (£3,124,556) plus an equalisation payment of 11.188% will be paid to growers on 30th July to bring the overall return up to contract rates. The appraised value of the Australian wool clip in 1942-43 was £66.65 m. and the equalisation payment of £6,874,000 brings the total return to £73.5 m. compared with £42 m. in 1938/39. It is estimated that in Australia 120,000 wool packs were saved in 1942-43 by pressing heavier bales of wool.

During the four seasons in the current war period Britain has purchased 14.4 m. bales of Australian wool. This is double the complete purchase in 1914-18.

A representative of the Australian Workers' Union has been appointed to the Central Wool Committee.

The new season's clips are beginning to arrive at ports from western and north-western areas of N.S.W.

British woollen exports decreased in 1942 as required by Governmental policy. Woollen and worsted fabrics exported totalled 73.25 m. yards, a decrease of 13.09m. yards. Exports of tops 11.75 m. lb. were 4.42 m.lb. below 1941 and yarn exports fell from 10.18 m.lb. to 8.75 m. lb.

Stocks of wool in U.S.A. are stated to be 1,798 m. lb. or nearly three years' normal consumption. Present consumption is 1,100 m.lb. and manufacturers have large government orders. The price of tops in New York is about 13% above a year ago.

/Wool

Wool stocks will probably be high at the end of the war and will be centred in a few countries. Civilian clothing stocks will be low all over the world. These are some of the factors which suggest a need for controlled marketing until abnormal circumstances disappear. The Australian Woolgrowers' Council favours the continuation of the contract bulk purchase system but the British Wool Federation favours relaxation of controls as soon as possible when the war ends.

WHEAT.

The area of 1943-44 wheat crops in New South Wales is expected to be less than last year. Unofficial estimates of a 20-30% decline have been made. In most districts seed has germinated well.

The Commonwealth Arbitration Court in July will begin hearing an application for an award for workers in the wheat industry. Growers' representatives have approached the Minister for Commerce and Agriculture and requested a higher return for wheat acquired by the Wheat Board.

DAIRY INDUSTRIES.

The subsidy for the dairy industry has been increased as from 1st April, 1943 to £6,500,000 p.a. Prior to 1st April a subsidy of 6/8 per cwt. on butter and 4/- per cwt. on cheese was payable on production since July 1st, 1942. The new rates of subsidy from April, 1st are estimated at 30/4 per cwt. (3½d. lb.) on butter and 14/2 per cwt. on cheese. The subsidy applies to milk used in the manufacture of particular classes of condensed and powdered milk as well as to milk used in butter and cheese production. To prevent a rise in land values, sales of dairy land are subject to the Treasurer's approval.

The Arbitration Court has submitted to the parties a draft award for dairy farm workers. Hours are limited to 56 weekly plus paid overtime. Two weeks annual holiday on full pay is provided. Rates of wage vary from £4/16/- for male shed hand over 20 years to £6/1/- for leading hands. Wages proposed for women over 20 years are 2/3 male rate. Keep may be deducted from above at 25/- p.w. for males and 20/- p.w. for females.

The State Minister for Health has been approached regarding the price paid to the producer of liquid milk for consumption in the metropolitan area. Milk is no longer rationed in the metropolitan area.

Butter and cheese production statistics for Australia and N.S.W. for April, 1943 and the ten months ended April are given below:

FACTORY PRODUCTION OF BUTTER AND CHEESE.

TONS.

Period.	Butter.		Cheese.	
	Australia.	N.S.W.	Australia	N.S.W.
April - 1941	14,238	3,876	1,588	204
1942	12,077	3,858	1,886	184
1943	9,058	2,736	1,484	115
July-April-				
1940/41	163,461	40,957	23,662	2,552
1941/42	140,694	32,526	25,736	1,949
1942/43	149,704	38,066	32,593	2,178

Pay to suppliers of cream to certain North Coast factories in May, 1943 was at the rate of 1/2½ per lb. of commercial butter made. The rate was the same as in April (see table B.S. 1943/5B). Deferred pay, which in the period July-Dec., 1942 was at the rate of 1⁷/₁₆ per lb., is excluded, but in the rate of

/1/2½ per

1/2¹/₂ per lb. was included 5d. subsidy under the earlier plan. The new subsidy of £6,500,000 p.a. from 1st April, 1943 has been allocated provisionally at 3¹/₄d. per lb. of butter. The Minister for Commerce and Agriculture expects that the average return to farmers for butter produced will be between 1/5 and 1/6 per lb.

Quotas of butter and cheese for local consumption in July, 1943 have been fixed at 86²/₃% and 88% respectively. These were the highest July quotas for some years.

PART II. FINANCE AND TRADE.GENERAL.

Commonwealth Finance. War (1939-) expenditure in 1942-43 was estimated at £560 m. by the Treasurer in a speech on 24th June, 1943. The increase over the Budget estimate was £120 m. and over the estimate of February last, £20 m. Revenue is expected to exceed the Budget estimate (£249 m.) by some £20m. Non-war expenditure in 1942-43 was estimated in February, 1943 at £112 m. The total Commonwealth expenditure is expected to exceed £670m. All these amounts are exclusive of income tax payable to State Governments (£27.17 m.)

Compared with the previous year, war (1939-) expenditure has increased by about £240 m. or 75%. Expenditure for (1939-) war purposes in the first half of the financial year 1942-43 was £253 m. and in the second half, £307 m. Non-war expenditure increased from £101.4 m. in 1941-42 to about £112 m. in 1942-43. War (1939-) expenditure overseas in 1942-43 is estimated at £A80 m.

COMMONWEALTH PUBLIC ACCOUNTS.

£'s millions.

Item.	Eleven months ended May			Full Year.	
	1941-42	1942/43	1941-42	1942/43	
				Budget Estim.	Latest Extim.
War expenditure -					
from Loan	18.6	383	211	300	400
" Revenue	80	118	109	140	160
Total	266	501	320	440	560
Non-(1939) war expend.					
from Revenue	93	102	101	109	112
Total Expenditure	359	603	421	549	672
" Revenue	173	220	210	249	272

Details of the estimated excess of revenue over Budget estimates are as follows:- Income tax £9 m. (rates increased 1/4/43); Customs and Excise £3 m., Post Office £2½ m., and miscellaneous £3.3 m.

The Commonwealth Parliament has been dissolved and general elections will be held on 21st August, 1943. Pending the introduction of the Budget in the new Parliament "supply" has been granted for the next three months, including £200 m. for war expenditure and £43.9 m. for other services.

The amount raised by loan (incl. Treasury Bills) for Commonwealth purposes in 1942/43 is approximately £400 m. of which Treasury Bills supplied about half. Outstanding Treasury Bills at the end of May, 1943 totalled £269 m.

The report of the Postmaster-General's Department for 1941/42 discloses a record surplus of £5,518,793, partly as a result of higher charges and partly of greater business.

The Loan Council will meet in July.

Tasmania has been allocated an additional grant of £200,000, making £775,000 for 1942-43 as recommended by the Commonwealth Grants Commission.

State Finance.

The Premier announced a surplus of £1.1 m. in the State accounts for 1942-43 (exclusive of the Main Roads Department which had an excess of revenue over expenditure of £459,277 at 31st May, 1943). The Consolidated Revenue Fund had

/an excess.....

an excess of revenue over expenditure of £88,418. The Budget estimates suggested a combined surplus of £25,675.

N.S.W. GOVERNMENT ACCOUNTS.
C.R. Fund & Business Undertakings, etc. (Incl. Main Roads Dept.)

Item.	Eleven Months ended May.					
		1939	1940	1941	1942	1943
Revenue	£m.	51.64	55.06	59.72	62.21	67.07
Expenditure	£m.	53.89	58.11	60.06	60.72	65.35
Surplus (+) or Deficit (-)	£m.	(-) 2.25	(-) 3.05	(-) 0.34	+ 1.49	+ 1.72

The State Government has provided £100,000 for a Cancer Institute. It will be concerned with research and treatment.

Private Finance. In April and May, 1943 trading bank returns disclosed a reversal of trends in deposits and advances. Current account balances declined, probably due to Easter spending (see decline in banks' cash), war loan subscriptions and tax payments. Advances expanded after a long-period decline. The movement probably was seasonal.

At June 21, 1943 the London funds of the Commonwealth Bank totalled £49.2 m. compared with £38.7 m. at June 15th, 1942.

BOND YIELDS.

The yields on Commonwealth bonds subject to current rates of taxation have been steady for the last few months. On June 16th, 1943 short-dated (2 years) bonds returned 2.49% p.a. (£2.9.10) and long-dated (12 years) bonds returned 3.24% (£3.4.10 p.a.)

SHARE PRICES.

Of the five groups in the Statistician's May, 1943 index of share prices, retail companies shares were the only ones to show weakness, the others remaining steady. The index of retail share prices fell two points. However, the combined index was unchanged as was the index for 34 active shares. Control measures designed to place a ceiling on share prices are showing their effect in steady indexes.

The Sydney Stock Exchange Research Bureau's Index of industrial share prices was 132.01 on 1st June and 132.17 on 30th June.

INDEX OF SHARE PRICES - SYDNEY.
Prices of ordinary shares - excl. banks. Par Value = 100.
(Compiled by N.S.W. Govt. Statistician).

Average for Month	Manufacturing & Distributing	Retail	Public Utilities	Pastoral & Finance	Insurance	Total 75 Companies	34 Active Shares
1937 - Mar.	214	204	181	169	281	190(a)	201
1939 - Aug.	213	168	156	118	264	174	182
1941 - Sept.	228	177	142	128	253	175	191
- Dec.	204	160	138	118	241	161	171
1942 - May	178	143	115	115	213	143	153
- Dec.	227	171	133	132	249	173	189
1943 - Feb.	232	179	137	134	251	177	195
- Mar.	234	180	138	133	251	178	196
- Apr.	234	180	141	133	254	179	196
- May	234	178	141	133	254	179	196

(a) Highest point recorded.

/SAVINGS.....

SAVINGS.

The rapid upward trend in savings bank deposits was resumed in May, 1943 after the temporary setback due to war loan subscriptions. Deposits in N.S.W. at the end of May were £118 m. compared with £92.9 m. in May, 1942 and £87 m. in August, 1939.

The net increase in deposits in N.S.W. during May, 1943 was £2,516,000. During the same month net sales of War Savings Certificates totalled £198,000. Sales of these Certificates during April, 1943 were high due to war loan publicity. The total amount of W.S. Certificates held in N.S.W. at 31st May was £12.3 m. Added to the wartime increase in savings bank deposits, the amount of these two forms of saving in N.S.W. since August 1939 is £43.3 m. The corresponding figure for Australia is £134.5 m.: in addition there were sales of £1.5 m. worth of £10 National Savings Bonds.

SAVINGS - N.S.W.

End of Month	Balance in Savings Bank Accounts	Net Total W.S. Certifs. Outstanding.	Period	Increase in Savings Bank Deposits.	Net Sales of W.S. Certifs. £'000
Aug 1939	£m. 87.0	£m. -	1941-yr.	£'000 6,774	£'000 2,717
May 1941	86.1	6.1	1942-yr.	14,087	3,494
" 1942	92.9	9.1	1941-May x.	(-) 886	300
" 1943	118.0	12.3	1942-May	1,814	224
			1943-Feb.	3,598	173
			-Mar.x.	2,824	196
			-Apr.x.	(-) 142	312
			-May.	2,516	198

x. War loans raised.

ø Sales less redemptions.

(-) Denotes decrease.

BANK CLEARINGS.

Sydney bank clearings have reached high levels. The index for May was 155 compared with 131 for the year 1942 and 100 in 1941 (base: Corresp. period 1926-30 = 100). The amount of clearings has exceeded £120 m. in each of the last three months compared with a monthly average of £104 m. in 1942.

REAL ESTATE.

The amounts involved in sales and mortgages of real estate in May, 1943 were very small.

REAL ESTATE SALES & MORTGAGES - N.S.W.
£ - thousands.

Year.	SALES.				MORTGAGES. (a)			
	Monthly Average	Mar.	Apr.	May	Monthly Average	Mar.	Apr.	May.
1938/39	2,939	3,623	2,245	3,090	2,089	2,225	2,025	2,112
1940/41	2,706	2,677	2,574	2,835	1,274	1,320	1,305	1,324
1941/42	2,437	2,083	2,276	1,154	1,070	996	891	526
1942/43	1,483 x	1,550	1,517	1,185	501 x	503	536	381

x Eleven months July-May.

/WHOLESALE....

WHOLESALE TRADE.

Sales at wholesale by registered N.S.W. traders were valued at £21.9 m. in April, 1943. The increase over the previous month and over the corresponding month of the previous year was due to higher value of exempt sales (which include sales to the Commonwealth Government). While over the 10 months period July-April total sales this financial year were higher than in the previous year, sales of taxable goods actually declined in value by 16%.

WHOLESALE TRADE, N.S.W.

Sales by traders registered under Sales Tax Acts.

Total, taxable and exempt goods.

	1938/39.	1939/40.	1940/41.	1941/42.	1942/43
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Sales - £ million.

Year	192.3	204.3	215.3	235.2	-
Ten months ended April.	159.9	172.4	174.8	195.5	202.3
Month - Jan.	13.2	16.3	15.8	18.7	17.2
Feb.	16.5	14.6	17.5	19.4	21.6
Mar.	15.8	17.0	17.4	19.5	19.4
Apr.	15.8	17.9	19.1	19.2	21.9

RETAIL TRADE.

Retail sales in April, 1943 by 24 large Sydney stores were 16.0% below last year in value. The only section of wearing apparel for which the sales value was greater was girls' and children's wear. Books and stationery and food were the only other sections for which increased sales were shown.

Manchester goods came within the ration scale as from 7th June, 1943. The Rationing Commission has issued an order banning compulsory wearing of school uniforms.

A Government appointed committee is enquiring into the book shortage. Production, distribution and the use of paper suitable for books and periodicals will be investigated. Stocks of books, stationery etc. in reporting Sydney retail stores, included in the statistics below, were in April, 1943 12.3% below a year earlier.

RETAIL TRADE - SYDNEY.

(Experience of 24 Sydney Stores)

Percentage increase from corresponding period of the previous year.

Period	Net Value of Sales.	Value of Stock.	Wages & Salaries. Paid.	Number of Employees.
1939	+ 2.4	+ 2.0	+ 2.6	+ 0.9
1940	+ 6.3	+ 17.0	+ 4.0	+ 1.9
1941	+ 14.6	+ 8.0	+ 9.0	+ 4.0
1942	(-) 5.3	+ 9.2	(-) 5.1	(-) 8.4
March Quarter:-				
1941	+ 10.9	+ 3.7	+ 4.3	+ 2.1
1942	+ 11.5	+ 17.0	+ 5.7	+ 1.9
1943	(-) 18.8	+ 1.9	(-) 13.9	(-) 20.8
Month:-				
1942 - Nov.	(-) 16.3	(-) 1.2	(-) 14.4	(-) 18.9
- Dec.	(-) 23.1	+ 1.5	(-) 18.7	(-) 24.5
1943 - Jan.	(-) 15.3	+ 6.0	(-) 14.7	(-) 19.8
- Feb.	(-) 27.5	+ 2.2	(-) 17.9	(-) 23.0
- Mar.	(-) 14.1	(-) 2.4	(-) 9.4	(-) 19.5
- Apr.	(-) 10.0	(-) 2.3	(-) 16.0	(-) 20.0

(-) Denotes decrease.

OVERSEA TRADE.

Total Australian exports in 1941-42 were valued at £159.7 m. (excl. gold exported). The corresponding figures in 1940-41 and 1938-39 were £134.9 m. and £122.5 m. respectively. Imports showed a much greater rise. In 1941/42 import of merchandise were value at £186.7 m. (converted from £stg. at 125). Corresponding figures for 1940/41 and 1938/39 were £135.8 m. and £124.1 m.

Certain details available for publication are shown below. Wool exports in 1941/42 showed a large increase over the low level of 1940/41 but wheat and flour exports declined by half. Sugar, butter, meat and fruit exports also declined.

EXPORTS OF MERCHANDISE - AUST.

£A million.

Year	Wool	Wheat & Flour	Butter	Sugar	Meats	Hides & Skins	Dried Fruits	Fresh Fruits	Total (incl. other)
1928-29	61.6	26.3	7.2	2.4	6.3	9.3	2.3	0.9	138.6
1938-39	42.7	13.3	12.9	4.2	11.8	4.1	2.9	2.0	122.5
1939-40	56.9	12.8	15.9	6.2	15.1	4.2	2.0	1.2	149.7
1940-41	39.6	16.7	12.0	4.9	15.8	4.1	2.5	0.4	134.9
1941-42	58.0	8.8	8.1	2.6	14.1	6.0	2.6	0.2	159.7

(Excludes gold exports).

An analysis of imports shows that finished consumers goods declined from 24.1% in 1928/29 to 19.8% in 1938/39 and to only 12.5% of imports (by value) in 1941/42. Producers' materials except manufacturers' have also been imported in smaller quantities. Manufacturers' materials imported were valued at greater amounts each year from 1938/39 to 1941/42. However, the outstanding feature of the table is the column headed "Fuels, Aids to Production, Munitions" which items accounted for 13.6% of imports in 1938/39 and 33.5% in 1941/42.

The Prime Minister has announced that Lend-Lease Aid from U.S.A. was at a rate equal to two or three times the approximate value of reciprocal aid to U.S. troops in Australia.

IMPORTS OF MERCHANDISE BY CLASSES-AUST.

£m. stg.

Year.	Producers' Materials for use in -				Fuels, Lubricant Aids to Production, Munitions	Capital Equipment				
	Building & Constr.	Rural Inds.	Manufacturing	Total		Producers' Equipment	Transport Equipment			
	%	%	%	%	%	%	%	%	%	%
1928-29	10.2	7.1	1.9	1.3	53.2	37.1	65.3	45.5	14.9	10.5
1938-39	4.0	4.1	1.8	1.8	37.9	38.2	43.7	44.1	13.6	15.6
1939-40	4.0	3.5	1.6	1.4	47.9	41.4	53.5	46.3	21.6	18.6
1940-41	3.0	2.7	1.1	1.0	49.2	45.3	53.3	49.0	21.5	19.8
1941-42	2.6	1.8	1.0	0.7	55.5	37.1	59.1	39.6	50.1	33.5

Year	Finished Consumers' Goods.							Total Imports.	
	Food, Beverages, Tobacco.		Clothing & Accessories.		All Other.		Total		
1928-29	10.6	7.4	2.9	2.1	21.0	14.6	34.5	24.1	143.3
1938-39	5.9	6.0	0.9	0.9	12.8	12.9	19.6	19.8	99.3
1939-40	6.6	5.7	0.9	0.8	13.8	11.9	21.3	18.4	115.7
1940-41	5.5	5.1	0.9	0.8	10.7	9.8	17.1	15.7	108.7
1941-42	5.9	3.9	1.4	0.9	11.4	7.7	18.7	12.5	149.4

PART III. INDUSTRY, TRANSPORT, etc.EMPLOYMENT.

The estimated total number of wage and salary earners employed in N.S.W. (excl. rural employees and household domestics) was 767,100 at the end of April, 1943. Females employed increased by 700 but males decreased by 2,700. Private employment decreased sharply but Government employment (incl. Civil Constructional Corps) again increased.

The latest statistics derived from Pay-Roll Tax returns, which are classified in certain broad industrial groups, are shown below. Employment in building decreased slightly in April. Retail and wholesale trade declined further. "Other commerce and finance" was steady except for a downward seasonal movement in wool and produce brokers' establishments. There was a slight fall in males employed in personal service (primarily hotels).

Factory employment is shown later.

N.S.W. ESTIM. NON-RURAL EMPLOYMENT
 (Excl. Household domestic).

Month.	Males. 000	Females. 000	Total 000
1939-July	535.6	160.7	696.3
1941-July	561.0	208.5	769.5
-Dec.	566.7	219.1	785.8
1942-Mar.	554.2	222.1	776.3
-Apr.	549.2	224.1	773.3
-July	539.1	225.1	764.2
-Nov.	532.1	233.2	765.3
-Dec.	530.1	235.1	765.2
1943-Jan.	531.2	235.0	766.2
-Feb.	532.4	236.5	768.9
-Mar.	530.4	238.7	769.1
-Apr.	527.7	239.4	767.1

NEW SOUTH WALES.EMPLOYMENT OF WAGE AND SALARY EARNERS AS RECORDED BY
EMPLOYERS ON PAY ROLL TAX RETURNS. (Thousands)

Last Pay Day in Month	Employees recorded by employers whose principal activity is:													
	Mining & Quarrying		Building & Construc-tion(a)		Transport (Excl. shipping)		Retail Trade		Wholesale Trade		Other Commerce & Finance(b)		Personal Service (Excl. household Domestics) (c)	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F
1941-July	21.7	0.1	20.5	0.5	60.7	2.7	31.9	31.8	29.1	10.1	20.9	9.8	16.3	20.3
Nov.	21.7	0.2	19.3	0.5	61.9	3.0	32.1	33.8	29.3	11.1	21.6	10.5	16.7	21.5
1942-Feb.	21.2	0.2	20.1	0.5	62.4	3.1	29.4	33.5	27.9	11.1	19.8	11.2	15.4	21.5
Mar.	21.2	0.2	19.9	0.5	62.3	3.3	28.5	33.1	27.6	11.0	19.3	11.3	15.1	21.5
Apr.	20.9	0.2	19.1	0.5	62.1	3.3	27.6	33.6	26.7	11.2	19.2	11.4	14.5	21.7
July	21.2	0.2	17.2	0.5	62.4	3.5	24.9	32.1	24.9	11.1	17.3	11.7	13.4	21.5
Dec.	20.7	0.2	15.4	0.5	62.4	4.3	24.6	32.9	24.6	11.4	16.3	11.7	12.7	21.6
1943-Jan.	20.8	0.2	15.9	0.5	62.7	4.6	23.3	31.5	24.7	11.5	16.5	11.8	12.7	21.7
Feb.	20.5	0.2	17.1	0.5	62.9	4.7	23.0	30.9	24.8	11.6	16.5	11.9	12.7	21.7
Mar.	20.5	0.2	17.0	0.5	63.2	4.9	22.6	30.8	24.3	11.2	15.8	11.8	12.8	21.8
Apr.	19.7	0.2	16.7	0.5	63.2	5.0	22.5	30.5	23.9	11.3	15.2	11.9	12.6	21.8

¶ Pay-Roll Tax returns are submitted by all employers (except C/wealth Govt., Charities, etc.) whose pay-roll exceeds £20 per wk.

(a) Excl. large numbers employed on Construction by Govt. authorities.

(b) Incl. wool and produce brokers, banks, insurance and commerce n.e.i.

(c) Incl. hotels, restaurants, entertainment, professional and personal service.

MANPOWER NOTES.

Details of the re-organisation of certain branches of the munitions industries are given later. Some displaced women have been offered work in textile factories

It has been announced that 55 Sydney women in unessential work or not gainfully occupied have been directed to textile and munitions factories and hospitals. Between April and June 1000 nurses were placed in Australian hospitals by the Manpower Directorate and the staff shortage was reduced by half. An appeal has been made for 500 trainees.

There is a shortage of labour at a country munitions factory but house accommodation in the area is already overtaxed. Manpower authorities intend to interview all the residents not engaged in the factory.

In four weeks of April, 1943 the authorities placed less than 1,000 part-time workers in employment. The Director-General of Manpower appealed for a great increase in the use of part-time labour.

Orchardists and nurserymen complain that their acute labour situation will have a serious cumulative effect on the industry.

For the sugar-cane season in Queensland 1,700 C.C.C. and 500 Army men have been released. The Allied Works Council has 49,600 engaged on contracts. Voluntary members of the C.C.C. number 10,600 while 17,200 were called up. Employees of other bodies enrolled were 35,100. Discharges total 13,300.

About 3,000 prisoners of war are engaged on work in Australia. Award rates are allowed but only 1/- a day may be drawn for current needs.

MANUFACTURING.

Estimated total employment in factories and works in N.S.W. (incl. working proprietors) was 315,800 at the end of April, 1943. There was little change compared with a month earlier - an increase in female employees offsetting a decrease in male employees. The chief movements in the factory classes were:

- a large increase in metal industries including vehicles and aircraft.
- a sharp decline (seasonal) in food and drink manufacturing.
- a small decrease in paper, printing etc. factories.
- an increase in "miscellaneous" group.

The index of factory employment 1938/39=100 was unchanged from March to April, 1943.

Sales during March and April in 42 large factories were at high levels.

Trading results in the shoe manufacturing industry have been investigated and a price reduction of 2½% ordered. Retail prices will be affected when new stock is handled. In 1943 only 15% of sole leather supplies in Australia were available for civilian shoes but in 1943 40% is available.

N.S.W. MANUFACTURING INDUSTRY.

	42 Large Factories			All Factories and works in N.S.W. (a)				
	Value of Sales	Employees	Weekly Wages & Salaries	Employment (incl. Working Proprietors)			Index of Employment 1928/29= 100	1938/39= 100
				M.	F.	T.		
1939-Av.	£m.	hundreds	£000	'000	'000	'000	No.	No.
1940 "	3.26	232	97	167	62	229	127	100
1941 "	3.59	243	106	172	65	237	131	104
1942 "	4.40	277	133	194	72	266	147	116
1941-Mar.	5.18	279	153	217	81	298	165	130
Apr.	4.20	272	125	202	74	276	153	121
1942-Mar.	4.01	272	119	201	73	274	151	120
Apr.	5.10	280	148	220	82	302	167	132
1943-Jan.	4.90	278	151	220	82	302	167	132
Feb.	5.81	275	156	222	90	312	172	136
Mar.	4.80	272	155	222	91	313	173	137
Apr.	5.45	270	153	223	93	316	175	138
	5.42	271	156	223	93	316	175	138

(a) Figures in respect of 1942-43 subject to revision. Yearly averages are for years ended June.

The index of consumption of electricity and gas in Sydney was 162 in May, 1943 (1929-31 average =100).

INDEX OF GAS AND ELECTRICITY CONSUMPTION.

(Av. Corresp. period 1929-31=100).

<u>1939.</u>	<u>1940.</u>	<u>1941.</u>	<u>1942.</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>May.</u>	<u>1943.</u>
131	135	148	154	160	160	167	160	162	

At a meeting of the Clothing Trade (Manpower) Advisory Committee in Melbourne it was decided to ask, former employees to return to the industry. A diversion from less essential to high priority apparel was suggested along with increased overtime. An Australian wide census of clothing in the hands of retailers, wholesalers and manufacturers on July 31 is to be made by the Australian Clothing Council.

On the advice of the Chiefs of Staff Committee the production of certain types of munitions in Australia is to be reduced. Reserve stocks have been built up but some plant will be held in reserve in case of emergency. Other capacity will be diverted e.g. to aircraft production and maintenance and ship repairs. Australia has begun production of a fighter aeroplane. The air mission which returned recently from U.S.A. has recommended to the Government the production of three new types of aircraft.

Diversion of labour from munitions will help to meet the demands of food processing industries. The Ministry of Munitions has accepted responsibility for production of an extensive range of agricultural machinery.

By the end of May, 1943 5,000 universal carriers had been produced in Australia and some of the future output is available for export to Allied countries. Naval motor patrol boats of a British pattern are being built in Australia for the R.A.N. They carry a crew of 14 to 16.

TRANSPORT.

On 1st June, 1943 there were 15,657 vehicles in N.S.W. fitted with producer gas equipment. 1,880 were equipped to use town gas. There was an increase of 201 in May in the number of lorries registered in N.S.W. Total motor vehicle registrations increased by 223 during the month.

The Commonwealth Parliamentary Committee on Public Works has reported on the recommendations of the U.S. mission which investigated oil production from shale in N.S.W. The Committee agrees with the mission's report, which was tabled in the House on 16th February 1943, that Glen Davis output of petrol should be expanded ultimately to 22.4m. gals. p.a. Actual output from the existing plant was a little over 1½ m. gals. in 1942. The carbonising of shale has not been successful at Glen Davis and was affected by unsatisfactory retorts and inadequate water supply.

The Scheme suggested by the U.S. mission would require daily 1½ m. gals. of water and the Committee recommends construction of a dam on the Fish River. The Commonwealth Government has already provided £2½m. for development of Glen Davis. The State Government advanced £166,000 to National Oil Pty. Ltd.

Housing conditions at Glen Davis were reported to be very unsatisfactory. The Bacchus Marsh scheme also will be investigated by the Committee.

RAILWAYS.

Passenger and freight traffic is heavy. In the ten months period July-April, passenger traffic in 1942/43 was 9% above 1941/42. Freight traffic had increased 6.3% in the same period.

Shearers and shed hands have been granted a travel concession in the current season.

N.S.W. GOVERNMENT RAILWAYS.

Year.	Month of April.			Ten Months ended April.				
	Tonnage of Goods & Livestock.	Gross Revenue	Excess of Revenue over Working Expenses. £	Passenger Journeys.	Tonnage of Goods & Livestock.	Gross Revenue	Excess of Revenue over Working Expenses. £	Passenger Journeys.
	'000	£000	£000	Million	'000	£000	£000	Million
1938/39	1,194	1,581	465	15.1	12,508	15,805	4,210	156
1939/40(a)	532	1,284	91	15.0	12,453	16,949	5,188	149
1940/41	1,325	1,922	387	16.5	15,073	19,402	6,491	159
1941/42	1,588	2,596	681	18.6	15,430	22,520	6,705	180
1942/43	1,601	2,771	876	19.9	16,404	28,330	6,553	196

Working expenses may include amounts not applicable to a particular month.

- ∅ Exclusive of interest, sinking fund, exchange, etc. (£6,570,000 in 1941/42).
- (-) Denotes deficiency.
- (a) Coal strike began March, 1940.

TRAMS AND BUSES.

Latest statistics of operations of Government tram and omnibus services are shown below. Passenger journeys are much above last year's figures and in the ten months ended April, 1941 exceeded the total for the year 1940-41. The excess of earnings over working expenses for the period July 1942 - April 1943 was lower than the excess for the corresponding period of 1941/42.

N.S.W. GOVERNMENT TRAMS & BUSES.Sydney and Newcastle.

Earnings.	Month of April.			Nine Months ended April.			
	Working Expenditure. £	Excess of Revenue over Working Expenses. £	Passenger Journeys (a)	Earnings.	Working Expenditure. £	Excess of Revenue over Working Expenses. £	Passenger Journeys. (a)
	£000	£000	£000	Million	£000	£000	Million
1938/39	373	305	68	31.6	3,542	3,074	568
1939/40	363	314	49	30.9	3,740	3,134	606
1940/41	413	342	71	35.3	3,969	3,204	765
1941/42	445	379	66	39.3	4,519	3,782	737
1942/43	467	400	67	42.1	4,662	3,991	671

- ∅ Exclusive of interest, S. fund, exchange and current depreciation (£605,000 in 1941/42).
- (a) Excl. Harbour Bridge Section tickets.

BUILDING.

The Chairman of the N.S.W. Housing Commission in evidence before the Commonwealth Housing Commission estimated that in N.S.W. there was a shortage of 80,000 to 85,000 houses. To meet such a situation would require some £40 m. expenditure on buildings. In 1935 a committee found 30,000 houses in Sydney to be sub-standard. The building surveyor of Greater Newcastle has classified 9,000 homes as sub-standard and the majority of them were just above "closing-order" condition.

/The value of.....

The value of private building projects for which permits were issued by metropolitan authorities in May, 1943 was £115,353 or a little below the monthly average in 1942 (£120,500). The principal items were new factories £23,094 and alterations and additions to factories £71,056.

VALUE OF PROPOSED BUILDINGS - N.S.W.

New Buildings, Alterations & Additions (except A.R.P.)

Period.	Private Building (Permits to Build)		Public Building.+ (C'w. & State Govts.)		Total.		
	Metrop- olis.	Other N.S.W. (as far as recorded). (a)	Metropolis.	Remainder of State.	Metropolis	Other N.S.W. (as far as recorded) (a)	Total (a)
Thousands of £'s.							
1939	12,219	5,362	x	x	x	x	x
1940	11,718	4,887	894	2,672	12,612	7,559	20,171
1941	10,847	4,758	1,725	2,894	12,572	7,652	20,224
1942	1,446	1,079	1,370	3,106	2,816	4,185	7,001
1942-Mar. Qr.	424	534	265	1,193	689	1,727	2,416
May.	98	(a)	65	189	163	x	x
Dec. Qr.	435	152	542	426	977	578	1,555
1943-Feb.	81	(a)	99	107	180	x	x
-Mar.	105	(a)	851	149	956	x	x
-Mar. Qr.	296	119	1,523	416	1,819	535	2,354
-Apr.	125	(a)	162	106	287	x	x
-May.	115	(a)	95	120	210	x	x

x. Not available.

+. Contracts accepted.

(a) Non-metropolitan authorities (covering approx. $\frac{3}{4}$ of the States' population exclusive of the Metropolitan area) supply only quarterly returns of private building permits.

Buildings commenced in the metropolitan area in May, 1943 included 13 dwelling houses. This made a total of 331 houses in the year ended May 1943 against 639 in the year 1942 and 7,177 in 1941.

BUILDINGS COMMENCED - METROPOLITAN WATER BOARD AREA.

Period.	Dwelling Houses (excl.flats)	VALUE OF BUILDINGS COMMENCED.					TOTAL		
		No.	£'000	£'000	£'000	£'000	£'000	£'000	£'000
1939	7,341	5,967	1,855	3,130	955	1,800	10,107	11,907	
1940	7,161	6,157	2,341	2,795	1,581	1,545	11,329	12,874	
1941	7,177	6,556	2,450	1,738	1,074	706	11,112	11,818	
1942	639	653	2,381	2,350	900	354	3,630	3,984	
1941-May	605	530	259	70	116	82	893	975	
1942-May	13	8	-	362	74	30	414	444	
July	22	32	1	200	50	21	262	283	
Dec.	20	8	-	53	261	18	304	322	
1943-Jan.	91	31	-	71	80	26	156	182	
Feb.	18	9	-	123	33	55	110	165	
Mar.	20	9	-	136	54	-	199	199	
Apr.	28	11	-	80	455	14	532	546	
May	13	6	-	139	48	17	176	193	

(a) Includes factories.